FAS REPORT

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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE WR 1-84

WASHINGTON, Jan. 5--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

OILSEEDS AND PRODUCTS

Soybean meal was listed among the new agricultural items included in the INDO-SOVIET TRADE PROTOCOL that the two governments signed on December 9, 1983. In recent years, both India's soybean and soybean meal production has increased. Since a significant portion of India's soybean meal is exported, the Soviet market may provide additional incentive for soybean meal export growth. The USSR has emerged as a major world market for soybean meal but the United States has not penetrated the Soviet market.

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Despite stable domestic consumption, PORTUGAL exported substantial quantities of soybean meal in 1983. During January-September 1983, Portuguese meal exports totaled 79,500 tons compared with 9,100 during the same period in 1982. Crushing capacity has more than doubled since 1980, turning Portugal from a significant importer to a net exporter of soybean meal.

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The gap between world prices of palm and soybean oils, the dominant vegetable oils in international trade, has virtually been eliminated. As recently as last summer, palm oil was selling at a $100 per ton discount to soybean oil in Rotterdam. Currently, palm oil is priced at a premium to soybean oil in Rotterdam. This changed relationship should benefit soybean oil trade, including U.S. exports, at least until Malaysian palm oil production rebounds.

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FISHMEAL EXPORTERS ORGANIZATION (FEO) COUNTRIES, which account for the bulk of world fishmeal supplies moving in world markets, registered significant declines during January-October 1983, when fishmeal production dipped to 1.07 million tons, 25 percent below the same 10 months in 1982. Fishmeal exports during the same period--at 951,000 tons--dropped 24 percent from the same period a year ago. Fishmeal stocks on Oct. 31, 1983, at 307,000 tons, were down by 38 percent from a year earlier. Data are as follows in 1,000 tons:

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Country	Jan-Oct 1982 Production	Jan-Oct 1982 Exports	Jan-Oct 1982 Ending Stocks	Jan-Oct 1983 Production	Jan-Oct 1983 Exports	Jan-Oct 1983 Ending Stocks
Chile	612	499	306	568	539	165
Iceland	42	53	12	39	37	2
Norway	271	181	99	328	226	105
Peru	505	523	81	134	149	35
Total	1,430	1,256	498	1,069	951	307

During October 1983, fishmeal exports by the FEO countries declined by nearly one-half from the same month a year ago to 96,000 tons. However, fishmeal production of 105,000 tons in October was about unchanged from the same month in 1982. Combined fishmeal stocks in the FEO countries gained by 9,000 tons during October 1983. This is a sharp contrast from October 1982 when stocks declined by 100,000 tons.

December fishmeal prices, basis Europe, were about $489 per ton--23 percent above the same month a year ago. In December, the fishmeal/soybean meal price ratio gained to 1.82 to 1.0 compared to 1.69 to 1.0 a year ago reflecting the reduction in FEO fishmeal supplies.

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Based on latest available data for the period beginning Jan. 1, 1983, with comparisons for the same months in 1982, net imports of soybeans and products by 10 SELECTED MARKETS amounted to 16.8 million tons soybean meal equivalent (SME) and 1.9 million tons in terms of oil. Compared with the same months a year ago, net imports in terms of SME declined slightly while oil equivalent imports were about unchanged.

Aggregate exports of soybeans and products from the United States, Brazil and Argentina since Dec. 1, 1982, increased to 33.6 million tons SME, up 2 percent from the same months a year earlier. Combined exports of soybeans and oil from the three producer-exporter countries totaled 6.1 million tons, oil basis, down about 1 percent from the same months a year earlier.

Soybean and product trade in terms of SME and oil for specified exporting and importing countries are as follows in million tons:

Country	Period	Total as Oil 1982	Total as Oil 1983	Total as Meal 1982	Total as Meal 1983	1983 Annual Change 1982	1983 Annual Change 1983
EXPORTS:	Dec. 1982 thru						
U.S.	Oct. 83	4.85	4.54	23.44	22.81	-0.31	-0.63
BRAZIL	Oct. 83	.89	1.15	7.57	8.86	0.26	1.29
ARGENTINA	Sep. 83	.42	.41	1.91	1.97	-0.01	0.05
TOTAL EXPORTS		6.16	6.11	32.93	33.65	-0.05	0.71

Country	Period	Total as Oil 1982	Total as Oil 1983	Total as Meal 1982	Total as Meal 1983	1983 Annual Change 1982	1983 Annual Change 1983
NET IMPORTS:	Jan 83 thru						
BEL-LUX	Jul. 83	.08	.08	.58	.54	+0.00	-0.05
DENMARK	Jul. 83	.04	.04	.85	.88	-0.00	0.02
FRANCE	Oct. 83	.08	.08	3.45	3.33	-0.00	-0.11
ITALY	Aug. 83	.20	.21	1.53	1.57	0.01	0.04
NETHERLANDS	Sep. 83	.18	.15	1.43	1.24	-0.03	-0.19
U.K.	Oct. 83	.23	.16	1.63	1.26	-0.07	-0.36
GER FED REP	Sep. 83	.37	.33	2.48	2.24	-0.03	-0.24
SPAIN	Oct. 83	.04	.09	1.78	1.87	0.05	0.09
PORTUGAL	Sep. 83	.02	.02	.36	.39	-0.00	0.02
JAPAN	Oct. 83	.66	.75	2.87	3.49	0.08	0.62
SUB-TOTAL		1.91	1.91	16.95	16.81	0.01	-0.16

Compiled from unrounded data.

COTTON AND FIBERS

BRAZIL has announced that the 10-percent export tax on lint cotton, cotton linters and cotton residues will be eliminated in April 1984. The tax was installed after the devaluation of the cruzeiro in February 1983.

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PAKISTAN's 1983/84 cotton crop is unofficially estimated by the U.S. agricultural attache in Islamabad at 2.4 million bales resulting from a more complete assessment of earlier rains and insect damage. In the major producing province of Punjab (accounting for approximately 65 percent of total production), the second and final picking is not yielding as well as previously expected. In the Sind, where nearly 35 percent of the cotton is grown, shortages of water due to a breakage in the Sukker Barrage gate and excessive rains during the growing season resulted in the spread of leaf roller and army worm.

TOBACCO

USDA recently announced that the 1984 flue-cured tobacco national marketing quota will be 805 million pounds, down 105 million from the 1983 crop. The 805-million-pound basic quota will be adjusted upward by approximately 30 million pounds because of net undermarketings during the 1983 sales season. The effective quota of 835 million pounds is 52 million below the 1983 effective quota. Marketings from the 1984 crop are expected to be near the 835-million-pound effective quota or 20 million below the 1983 crop.

U.S. supplies of flue-cured tobacco (quantity on hand at the start of the year plus the 1983 marketings) are estimated at 3.06 billion pounds. This is almost 700 million pounds above the level considered adequate to meet estimated domestic and export needs (reserve supply level). Current legislation provides for reducing the quota when supplies exceed the reserve supply level.

The Flue-cured Cooperative Stabilization Corporation has 773 million pounds of leaf tobacco in stocks with substantial quantities from all grade groups. This tobacco plus the 835 million pounds of marketings expected from the 1984 crop equal 1.6 billion pounds of leaf. This is equivalent to almost two and one-half years' use. Supplies of all grade groups will be well in excess of one year's normal use.

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In BRAZIL, tobacco producers and the industry have finally agreed on prices for south Brazil's 1984 tobacco crop. Prices were increased by 180 percent for Virginia, Amarelinho and burley, and 185 percent for Galpao Comum over 1983 levels. This is below the expected inflation rate of 210 percent for the year and less than the producers requested. However, if the average quality of the crop is better than the 1983 crop, returns to producers may be somewhat better than the agreed prices. Prices are negotiated and agreed upon by the Association of Tobacco Producers and the Syndicate of the Tobacco Industry.

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BULGARIA's 1983 tobacco production totaled 131,000 tons, down 14 percent from last year's revised harvest estimate of 152,000 tons, according to the U.S. agricultural attache in Romania. Dry weather reduced flue-cured and oriental leaf yields, whereas more extensive use of irrigation kept burley yields nearly unchanged. The outlook for the 1984 crop is for increased burley and flue-cured plantings at the expense of oriental.

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The U.S. agricultural officer in Sao Paulo reports that the harvesting of the 1984 tobacco crop in southern BRAZIL started in late November and should be finished in January. Southern Brazil normally accounts for about 75-80 percent of total Brazilian tobacco production. The region's 1984 tobacco crop is expected to reach 330,000 tons, up 11 percent from the 1983 harvest. Crop quality is expected to be about average but better than the previous crop.

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THAILAND's 1984 tobacco crop is forecast by the U.S. agricultural attache in Bangkok to be down marginally from the 1983 harvest. Production of flue-cured tobacco is expected to total about 53,000 tons, up 5 percent, while burley production is forecast at 20,500 tons, down 5 percent. Growers' intentions to expand 1984 flue-cured area substantially were curtailed somewhat by efforts of Thailand's Tobacco Monopoly and independent curers to limit sales of seed. The quality of the 1984 flue-cured crop is expected to be improved from 1983.

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The PHILIPPINES has restructured the specific taxes on locally manufactured and imported cigarettes under Executive Order 924 effective Nov. 16, 1983. The maximum retail price of cigarettes also was adjusted upward since higher production had rendered existing statutory ceilings unrealistic. The new taxes corresponding to the cigarette packs and retail prices are as follows:

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Description	Retail Price (Peso per pack)	Amount of Tax (Peso per thousand sticks)
Cigarettes packed in 30's (Local)	1.40 and below	3.00
	1.41 - 1.75	5.00
	Above 1.75	8.00
Cigarettes packed in 20's	2.65 and below	20.00
	2.66 - 3.25	28.00
	3.26 - 4.00	32.00
	4.01 - 4.50	46.00
	4.51 - 5.00	64.00
	5.01 - 5.60	91.00
	Above 5.60	121.00
Imported		121.00

VEGETABLES

As of Nov. 30, 1983, area planted to vegetables by private sector farms in Sinaloa, MEXICO's major winter vegetable producing State, totaled 22,300 hectares, up 23 percent from the same time in the 1982/83 season. Tomatoes were up 27 percent over last season, bell peppers by 35 percent, cucumbers by 27 percent, eggplant by 19 percent and zucchini by 1 percent. Private sector farms account for 70-90 percent of the total vegetable area in Sinaloa. Last season, roughly half of the tomato, cucumber and squash and three-fourths of the bell pepper and eggplant plantings had been completed by the end of November. Rains during planting this season caused no serious damage to vegetable crops.

FRUITS AND NUTS

Total MEXICAN citrus production in 1983/84 is now forecast at 1.9 million tons, down 29 percent from the November forecast. The 1982/83 citrus production estimate is now 2.2 million tons, down 16 percent from the November estimate (see WR 48-83). Production figures, by fruit type, are as follows in 1,000 tons:

Fruit Type	1980/81	1981/82	1982/83	Forecast 1983/84
Oranges	1,600	1,650	1,350	1,100
Tangerines	120	130	110	120
Grapefruit	163	115	100	90
Lemons	1	2	3	3
Other (Limes)	590	630	620	600
Total	2,474	2,527	2,183	1,913

The revisions are based on an extensive December 1983 field visit by USDA personnel. The revisions for 1983/84 reflect a reappraisal of Mexican citrus production prior to the freezing temperatures of late December 1983. The freeze is believed to have caused significant losses, but no specific figures are available at this time.

WOOD AND WOOD PRODUCTS

Forested area in AUSTRIA covers 3,754,000 hectares, 45 percent of the country's total land mass. High-quality conifers predominate, with the main species being Norwegian spruce (64.2 percent), Scotch pine (8.5 percent), European larch (3.7 percent), silver fir (3.2 percent) and black/cembra pines (1.1 percent). Hardwoods, chiefly beech and oak, make up the remaining 19 percent. Austria's forest area has been expanding consistently since the 1960's. The average per annum gain during the past 10 years has been approximately 4,400 hectares. However, the annual growth rate for 1982 dropped to about 3,000 hectares.

Government regulations mandate that all harvested area be reforested within five years. The average annual reforested area fluctuates between 17,000 and 21,000 hectares with 17,700 hectares reforested in 1982.

The 1982 Austrian timber harvest amounted to 11.1 million cubic meters (CUM), considerably below the 12.2 million CUM harvested in 1981. The decline is generally attributed to poor export demand for Austrian coniferous lumber.

Austria is a significant producer as well as a net importer of softwood logs from Eastern Europe. In recent years, Austria has become a leading exporter of both sawnwood and other wood products. Approximately 90 percent of Austria's total wood panel production is particleboard. Since annual output of particleboard is well in excess of domestic requirements, over 500,000 CUM are exported each year.

Supply and distribution of selected wood products are estimated as follows in 1,000 cubic meters:

SUPPLY AND DISTRIBUTION OF WOOD PRODUCTS
IN AUSTRIA

COMMODITY	S & D	1981	1982	1983
Softwood Logs	Production	8,284	7,156	7,520
	Imports	1,058	1,619	1,600
	TOTAL SUPPLY	9,342	8,775	9,120
	Exports	148	144	120
	Domestic Consumption	9,194	8,631	9,000
	TOTAL DISTRIBUTION	9,342	8,775	9,120
Total Sawnwood	Production	6,427	5,803	6,025
	Imports	382	407	448
	TOTAL SUPPLY	6,809	6,210	6,473
	Exports	3,905	3,480	3,670
	Domestic Consumption	2,904	2,730	2,803
	Ending Stocks	0	0	0
	TOTAL DISTRIBUTION	6,809	6,210	6,473

Softwood Lumber	Prooduction	6,024	5,563	5,800
	Imports	279	306	343
	TOTAL SUPPLY	6,303	5,869	6,143
	Exports	3,810	3,400	3,600
	Domestic Consumption	2,493	2,469	2,543
	Ending Stocks	0	0	0
	TOTAL DISTRIBUTION	6,303	5,869	6,143
Particleboard	Production	1,156	1,045	1,050
	Imports	33	46	55
	TOTAL SUPPLY	1,189	1,091	1,105
	Exports	582	510	565
	Domestic Consumption	607	581	540
	Ending Stocks	0	0	0
	TOTAL DISTRIBUTION	1,189	1,091	1,105

SCHEDULE OF ESTIMATE RELEASES--1984

Release dates in 1984 for world production estimates for selected commodities through the Weekly Roundup of World Production and Trade are as follows:

January	18	World Tree Nut Production
	25	World Deciduous Fruit and Grape Production
February	23	World Cocoa Production
March	7	World Poultry and Egg Production
	7	World Livestock Numbers and Red Meat Production
	14	World Dairy Production
April	18	World Pineapple Production
	25	Southern Hemisphere Dried Fruit Production
May	9	World Sugar Production
	23	World Tobacco Production
	31	World Livestock Numbers and Red Meat Production
	31	World Poultry and Egg Production
June	6	World Coffee Production
	6	Southern Hemisphere Citrus Production
July		No reports scheduled.
August		No reports scheduled.
September	6	World Poultry and Egg Production
	6	World Livestock Numbers and Red Meat Production
	12	World Honey Producton
	12	World Dairy Production
	19	World Almond and Filbert Production
	19	Northern Hemisphere Apple and Pear Production

October	3	World Cocoa Production
	17	World Walnut and Pistachio Production
	24	World Sugar Production
	31	Northern Hemisphere Dried Prune and Raisin Production
November	21	World Tobacco Production
	28	World Poultry and Egg Production
	28	World Livestock Numbers and Red Meat Production
	28	Northern Hemisphere Citrus Production
December	5	World Coffee Production

In 1984, summaries of world grain, oilseed and cotton production will be released in the monthly FAS circular, World Crop Production. More comprehensive coverage will continue to be provided in the regular series of FAS commodity situation circulars. Commodity situation and World Crop Production circulars may be subscribed to by contacting:

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Release dates for the World Crop Production reports are as follows:

January	13	May	9	September	12
February	10	June	11	October	11
March	9	July	10	November	9
April	9	August	10	December	10

Selected International Prices

Item	Jan. 3, 1984		Change from previous week	A year ago
ROTTERDAM PRICES 1/	$ per MT	$ per bu.	$ per MT	$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%11/	198.00	5.39	-3.00	202.00
U.S. No. 2 DNS/NS: 14%....	194.00	5.28	0	183.50
U.S. No. 2 S.R.W..........	165.00	4.49	+3.00	151.00
U.S. No. 3 H.A.D.11/.....	208.00	5.66	0	171.00
Canadian No. 1 A: Durum.11/	209.00	5.69	-3.00	197.00
Feed grains:				
U.S. No. 3 Yellow Corn....	159.00	4.04	-3.00	117.50
Soybeans and meal:				
U.S. No. 2 Yellow.........	328.00	8.93	+1.50	230.00
Brazil 47/48% SoyaPellets 2/	287.00	--	+1.00	231.50
U.S. 44% Soybean Meal.....	263.00	--	0	217.00
U.S. FARM PRICES 3/				
Wheat.....................	128.24	3.49	-.74	128.60
Barley....................	104.26	2.27	+9.19	61.09
Corn......................	128.34	3.26	+.79	89.36
Sorghum...................	113.32	5.14 4/	+1.32	90.61
Broilers 5/...............	1379.42	--	+54.23	N.Q.
EC IMPORT LEVIES				
Wheat 6/.................	52.15	1.42	-12.75	112.25
Barley....................	39.40	.86	-8.60	106.85
Corn......................	38.10	.97	+.45	110.35
Sorghum...................	54.55	1.39	+.55	103.35
Broilers 7/...............	N.Q.	N.Q.	N.Q.	N.Q.
EC INTERVENTION PRICES				
Common wheat(feed quality)	171.65	4.67	+4.90	187.85
Bread wheat (min. quality)10/	187.50	5.10	+5.05	206.75
Barley and all other feed grains.......	171.65	--	+4.90	187.85
Broilers 9/..............	N.Q.	N.Q.	N.Q.	N.Q.
EC EXPORT RESTITUTIONS (subsidies)				
Wheat	N.A.	--	--	N.Q.
Barley....................	N.A.	--	--	N.Q.
Broilers 7/...............	N.Q.	N.Q.	N.Q.	N.Q.

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine. 3/ Based on selected major markets and adjusted to reflect farm prices more closely. 4/ Hundredweight (CWT). 5/ Twelve-city average, wholesale weighted average. 6/ Durum has a special levy. 7/ EC category--70 percent whole chicken. 8/ Reflects lower EC export subsidy-down to 20.00 ECU/100 bag effective 14 Sept 83 from 22.50 ECU/100 bag set in Feb 1983. 9/ F.o.b. price for R.T.C. broilers at West German border. 10/ Reference price. 11/ April-May shipment. N.Q.=Not quoted. N.A.=None authorized. Note: Basis January delivery.

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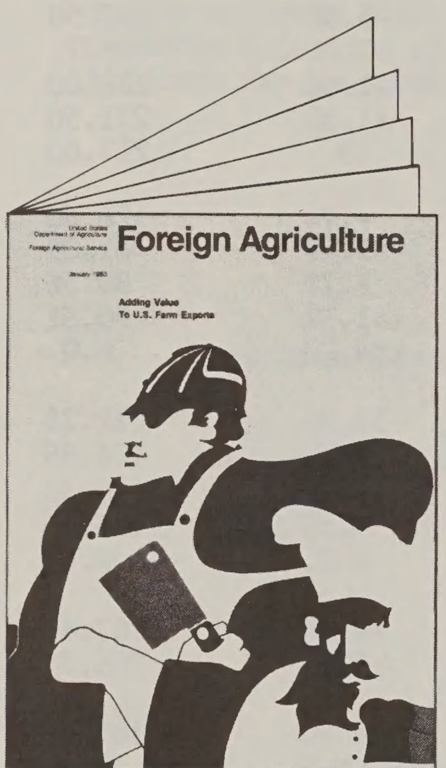

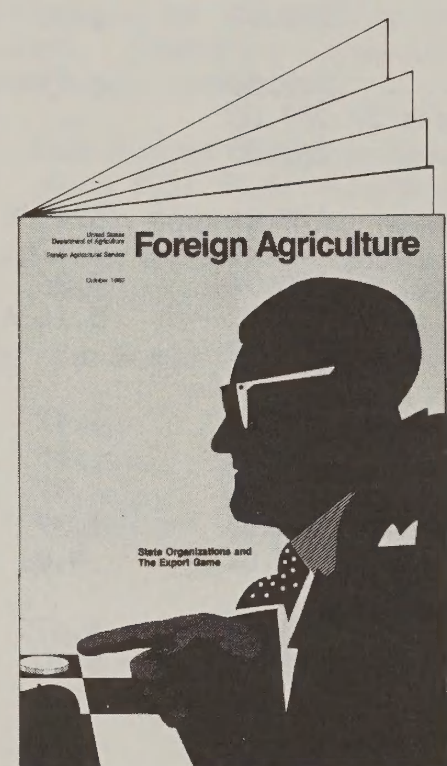

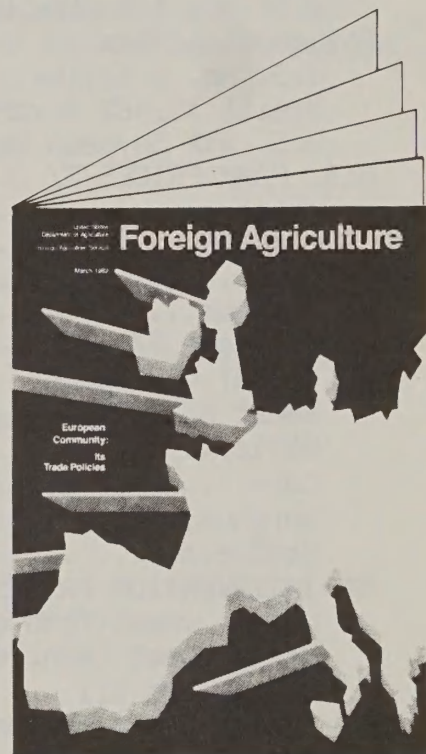

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